



Monthly Market Intelligence

The latest insight from the UK's largest new and used car platform.

JUNE 2026

 Autotrader

New car market climbs while used cars sell at pace despite summer distractions.

New car registrations



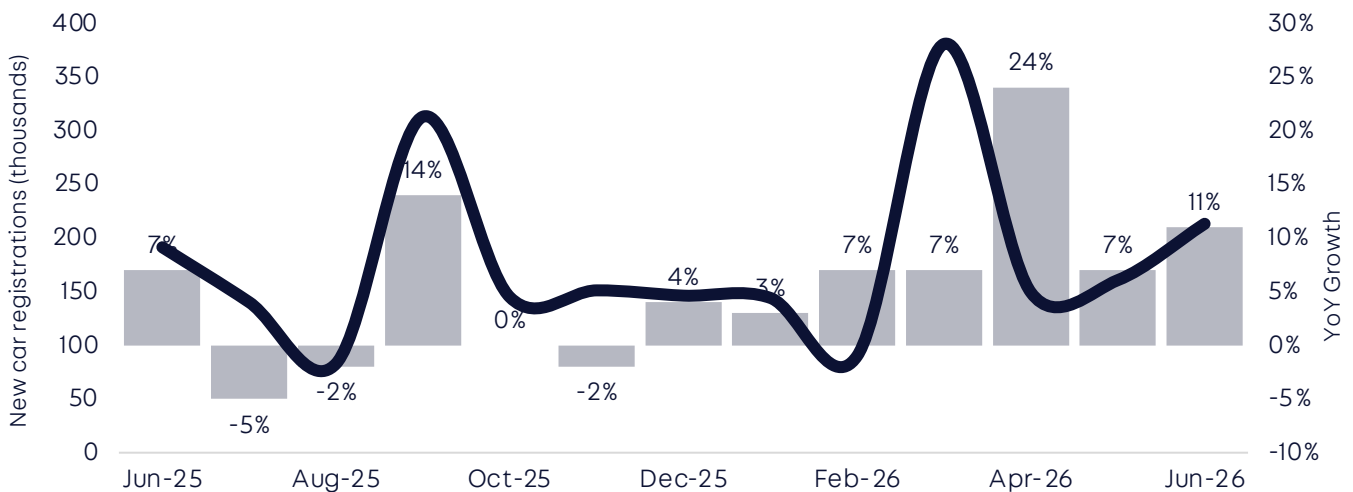
New car registrations grew 11.4% in June, with over 213,000 units marking the strongest June performance since pre-Covid, pushing the market up by 9% YTD. Strong electrified performance continued; plug-in hybrids climbed 25% year-on-year, while EVs grew 35% to capture a 30% share in June and a record 25% YTD. Growth was recorded across all channels, with private maintaining a strong recovery and rising 13% YTD.

213,166

New car reg. (SMMT)

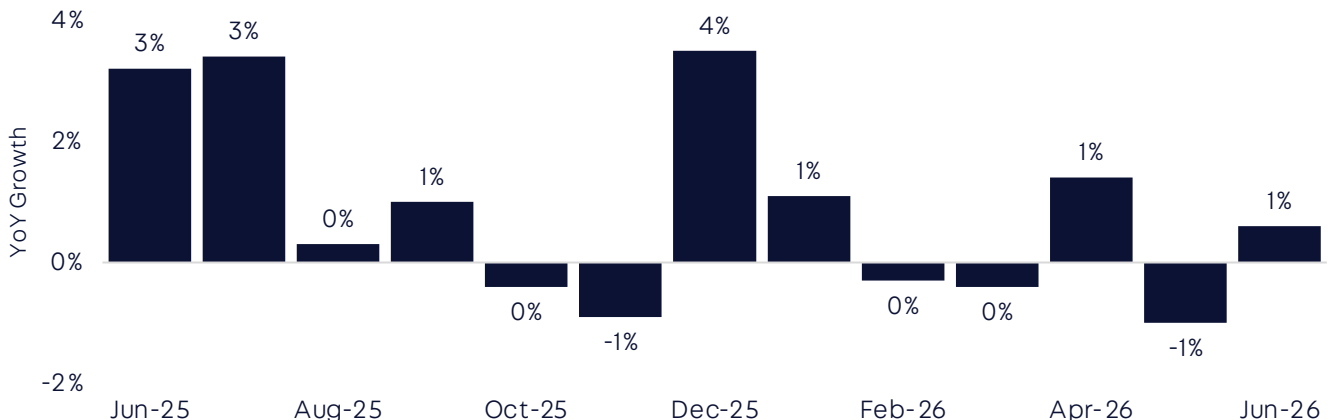
+11.4%

(vs. June 2025)



Used car sales (Year-on-year)

Used car transactions rose 1%* YoY in June, leaving YTD performance level. Electric cars continue to lead, growing 33% in June and 59% YTD, though flat stock levels have slowed momentum compared to April's peak. Across retailer types, Franchises entered their fourth consecutive month of growth, up 2% in June and 1% YTD. In contrast, Independent retailers saw a slight 1% dip in the month, keeping their YTD performance broadly flat.

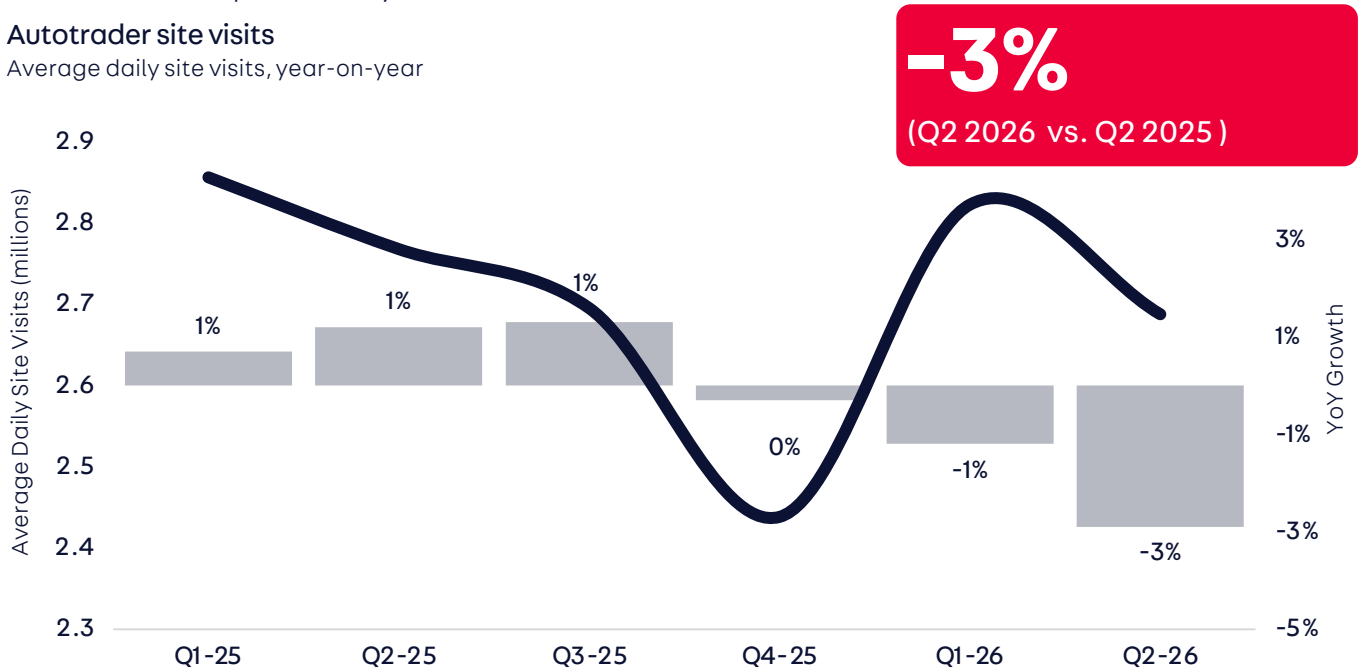


*Data based on vehicles removed from Autotrader. We assume that the vehicle is sold on the last day we saw it on our site. Strong historical correlation to official SMMT used car transactions and retailer data. Ongoing improvements to the data means historic figures may change slightly each month.

Site visits to Autotrader fell 7% YoY in June, pulling YTD levels down by 2%. Although affected by temporary distractions like the World Cup and a sudden heatwave, traffic remains close to the exceptionally strong 2024 baseline. Despite these factors, underlying intent is robust; GfK consumer confidence held firm at -23, and 74% of Autotrader consumers still plan to buy a car in the next six months¹.

Autotrader site visits

Average daily site visits, year-on-year

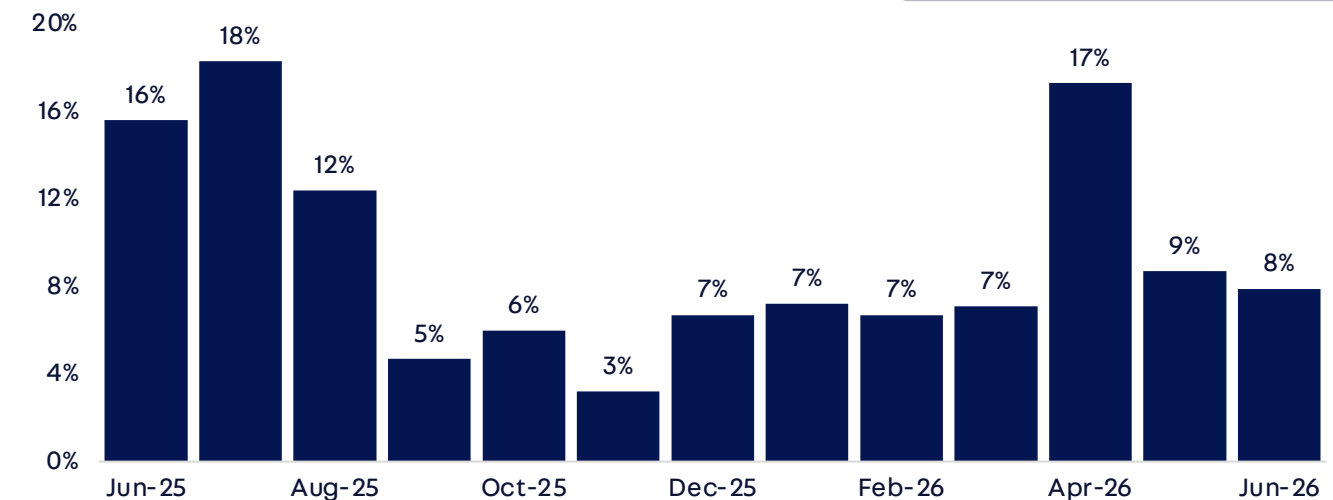


New car activity

A strong month for new car retail demand, up 8% YoY, solidifying a strong Q2. While EVs remained the most enquired fuel type, PHEVs achieved a record 22% share with JAECOO, MG and Chery making up over 1 in 2 of PHEV enquiries. Petrol discounts reached 11.7%, overtaking electric for the first time, as brands compete with compelling offers from new market entrants.

Autotrader new car visits*

Year-on-year

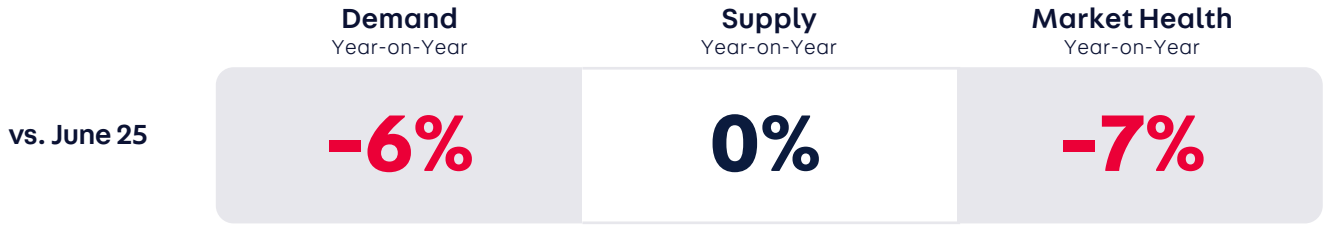


+8%
New car visits (vs. June 2025)
-3% MoM

26%
EV lead share
-1.4ppts MoM

¹Source: Autotrader Consumer Survey Data (n=1186)

The used car market continues to show resilience, with a flat supply balancing a slight softening in demand caused by lighter traffic. Beneath the surface, shifting fuel dynamics are transforming younger cohorts; ICE demand reduces against tightening stock availability, while EV interest surges by 24%. While the overall market turns steadily every 30 days, intense demand means EVs are selling a full week faster than last year at 25 days.



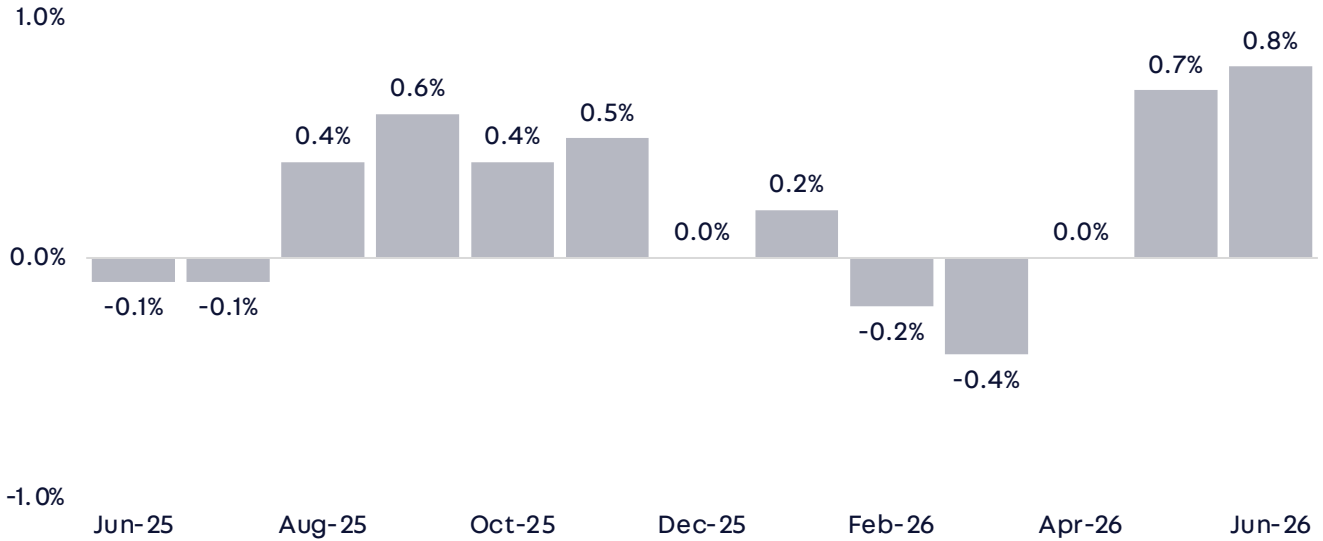
The Market Health metric shows the ratio of supply vs. demand compared to the previous year*

	Demand Year-on-Year	Supply Year-on-Year	Market Health Year-on-Year
Jun 26	-6%	0%	-7%
May 26	-5%	-7%	2%
Apr 26	-1%	-8%	7%
Mar 26	-4%	-3%	-0%
Feb 26	0%	1%	-1%
Jan 26	-1%	-1%	0%
Dec 25	-2%	-1%	-1%
Nov 25	-2%	2%	-3%
Oct 25	-3%	2%	-5%
Sep 25	-5%	1%	-6%
Aug 25	-2%	0%	-2%
Jul 25	2%	1%	1%
Jun 25	0%	3%	-3%

Used car prices grew for a second consecutive month in June, rising +0.8% YoY as cars aged three years and older continued to strengthen. The 10-15-year-old segment remains the standout performer, up +7.8% to extend its streak of strong price growth well beyond a full year. In a significant market shift, both electric and plug-in hybrid cars recorded their first month of positive pricing growth since December 2022. EV gains were largely driven by an +8.9% surge in 3-5-year-old models with ongoing softening in younger cohorts.

Year-on-year used car retail price growth

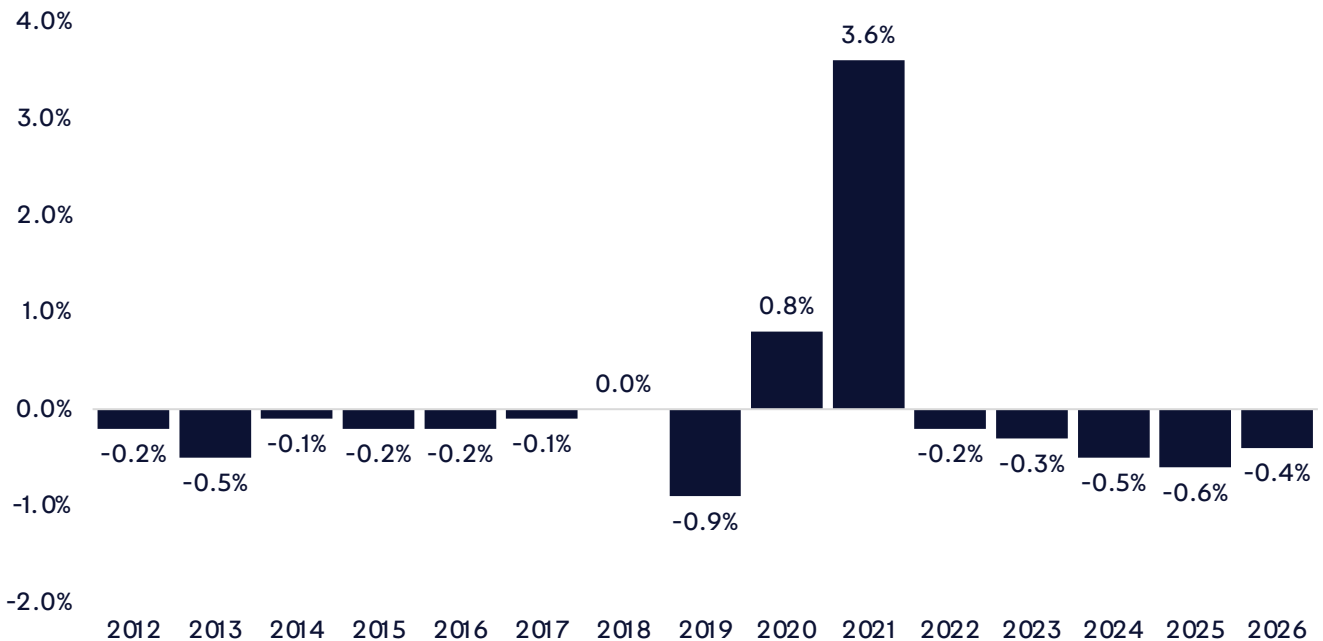
Like-for-like basis



On a month-on-month basis used car prices declined -0.4% in line with seasonality, though key segments defied the wider market. Cars aged 10-15 years bucked the downward trend to record growth, consistent with historical pricing for this age bracket. Meanwhile, EVs delivered a standout performance; while all other fuel types saw negative movements, EV prices grew +1.4%, bucking both the overall market trend and their typical seasonal patterns.

Month-on-month used car retail price growth: June

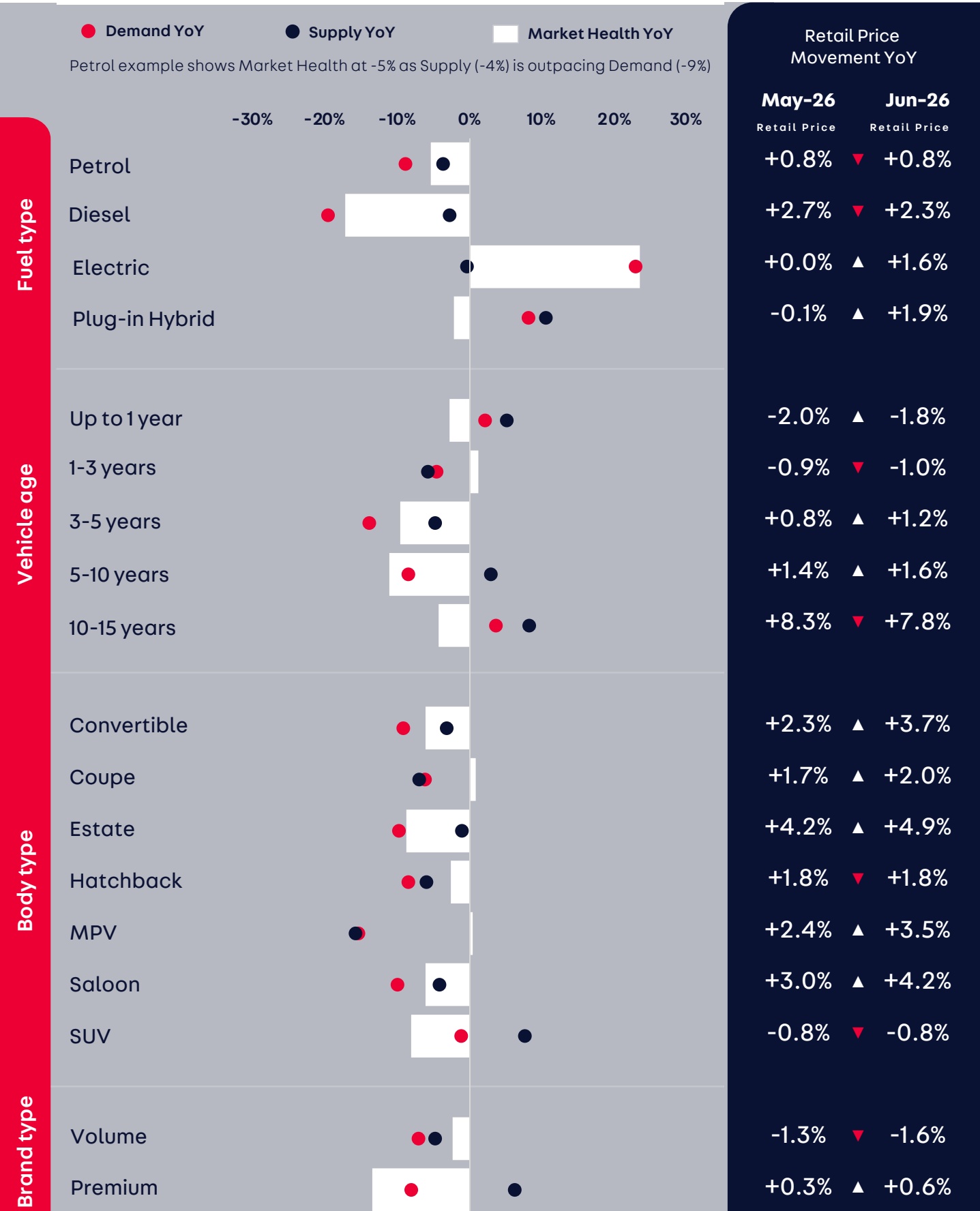
Like-for-like basis



Retail price observations. Year on year like-for-like pricing. Removes the impact of stock mix shift to reflect true value adjustments

(YoY growth)

Charts show Market Health (blue bar), Demand (red) and Supply (white), with pricing movements. The monthly movement of retail prices is illustrated by blue/red arrows.



In focus this month

The next supply squeeze: The Covid gap enters the 5-7-year-old market.

The 2020 shockwave



In 2020, national lockdowns and a critical semiconductor shortage caused new car volumes to plummet by -29% compared to 2019, triggering a multi-year supply crisis.

The impact to brands varied, with Ford taking the largest hit (-84k units, -35%), whereas Toyota saw a much softer decline of 11% (-12k units). While early-growth brands like MG and Tesla successfully bucked the broader downward trend, the wider market struggled.

Ultimately, only 4 of the top 20 brands (Kia, Skoda, Renault & Volvo) have regained their pre-pandemic volumes in 2026 YTD versus 2019 YTD.

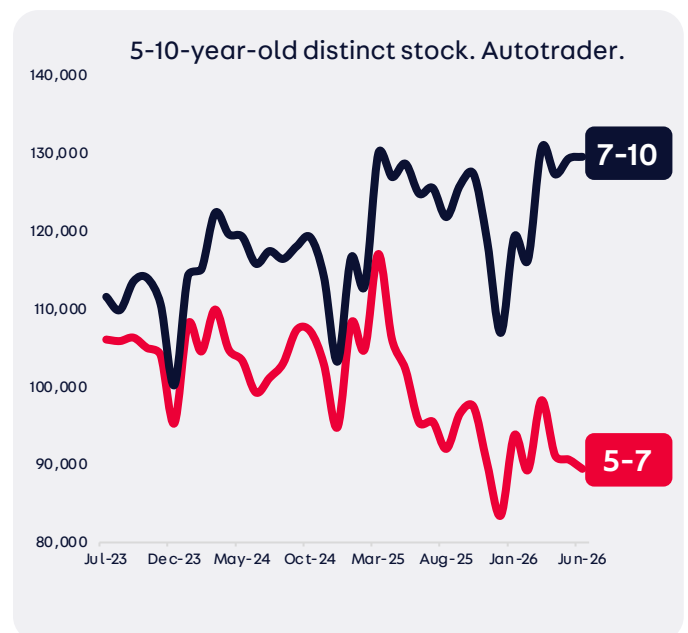


Covid gap hits 5-7-year-olds



The Covid gap that previously constrained 3-5-year-old cars has now aged into the 5-7-year-old cohort. While the broader 5-10-year-old segment shows an overall 3% year-on-year supply increase, this headline figure masks a deepening divide where 5-7-year-old stock is actively shrinking, offset only by growth in 7-10-year-old supply.

This split is also evident at a brand level; on Autotrader, stock of 5-7-year-old Fords has declined by 11%, with 7-10-year-old supply stable, by contrast.



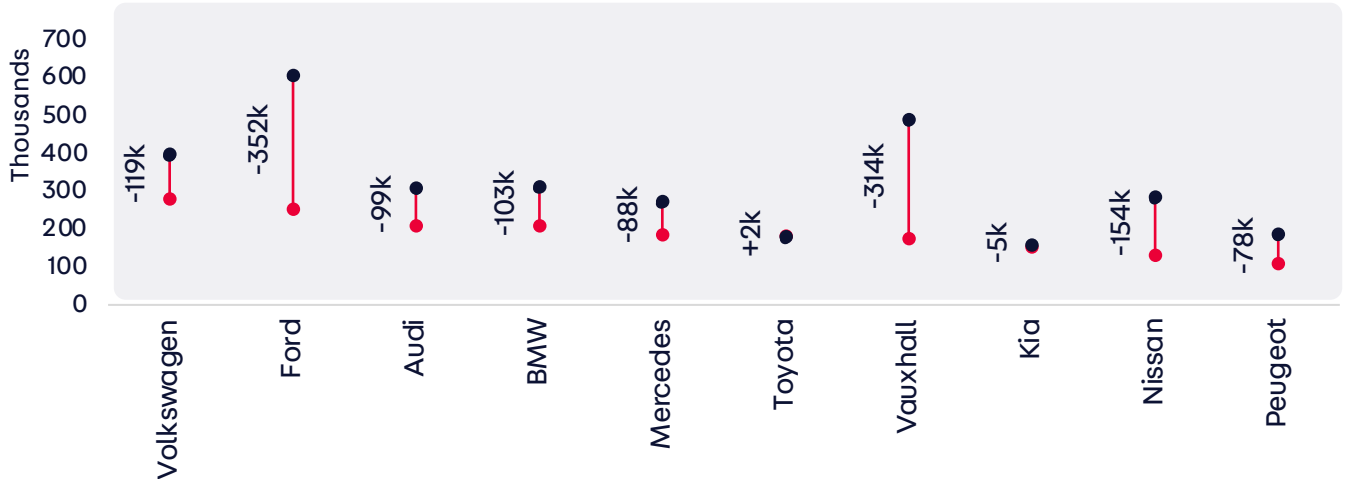
Shifting 5-7-year-old brand car parc

Consequently, the Covid gap along with shifting product strategies have fundamentally altered the 5-7-year-old brand car parc. The first of two notable examples, Ford has experienced a sharp drop-off; following the discontinuation of the historically dominant Fiesta and Focus, its current volume leader, the Puma, has not replaced those previous highs.

Vauxhall sees a similar trend, as its transition toward electrification has seen Corsa and Astra volumes fail to match pre-pandemic levels. Between the two brands, there are far fewer traditional, high-volume cars in today's market.

5-7-year-old brand car parc forecast. Autotrader forecast, DVLA historical.

● 2026 ● 2021



Older premium for the price of younger volume

Affordability and supply dynamics are shifting consumer preference towards older premium cars. A £15,000-£18,000 budget that pre-pandemic secured a 3-5-year-old premium car now stretches only to 5-7-year-old version, forcing a choice between a newer volume model and an older premium alternative.

With premium brands less affected by the Covid supply gap compared to volume, consumers also benefit from greater supply in this segment. As a result, premium brands account for 57% of enquiries within the 5-7-year-old cohort, compared to 43%-48% in younger age brackets.

Volume vs Premium average price – June 2026. Autotrader

3-5-year-old Volume		5-7-year-old Premium	
	Nissan Qashqai £17,125		Mercedes-Benz A Class £16,735
	Kia Niro £17,473		Tesla Model 3 £15,905
	Volkswagen Polo £15,098		BMW 1 Series £16,936
	Toyota Yaris £16,719		Range Rover Evoque £17,639
	Ford Kuga £17,641		Audi A3 £15,958

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